Employee Compliance Dates

Quick Reference Guide

(This document was last revised on July 10, 2025)

Feature Overview

Stay ahead of critical deadlines with the new Compliance Dates feature in iTacit. Designed to help organizations track important employee-specific dates - like license renewals or background checks - this feature ensures nothing slips through the cracks. With automated notifications, centralized visibility, and flexible configuration, Compliance Dates empowers administrators and managers to maintain compliance effortlessly and proactively.

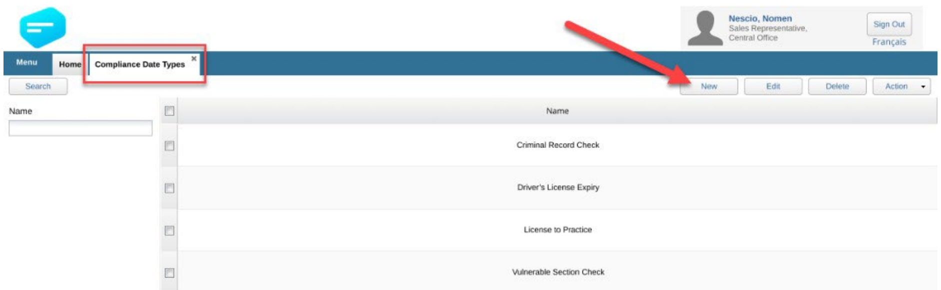
When To Use This Feature

Use Compliance Dates when you need to monitor time-sensitive employee requirements that are not tied to training or forms. For example, HR teams can track when an employee's Driver's License or Nursing License is about to expire and automatically notify the employee and their manager in advance.

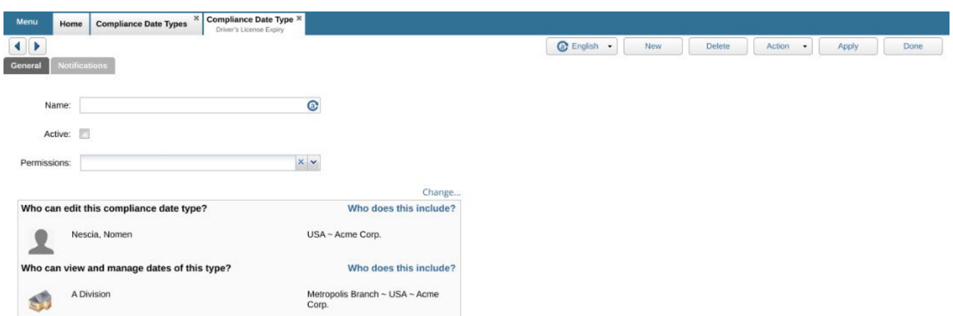
How To Use It (Step-by-Step)

FOR ADMINS: SETTING UP COMPLIANCE DATE TYPES

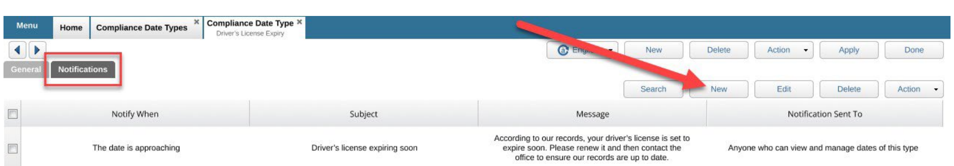
1. Go to Admin > Employees > Configuration > Compliance Date Types
2. Create a New Compliance Date Type
   a. Click New



   b. Enter the Name (e.g., "Criminal Record Check")
   c. Set as Active
   d. Assign Permissions for who can view/manage this type
   e. Click Apply



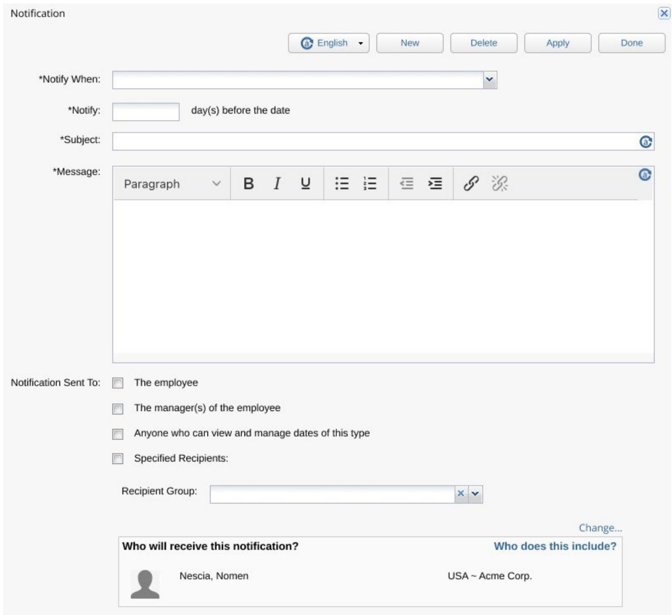
3. Configure Notifications
   a. Go to the Notifications tab
   b. Click New to add a notification rule



   c. Choose when to notify (e.g., "5 days before the date")

d. Enter Subject, Message, and select recipients (e.g., employee, manager, permission-based, or recipient group)

e. Click Apply, then Done



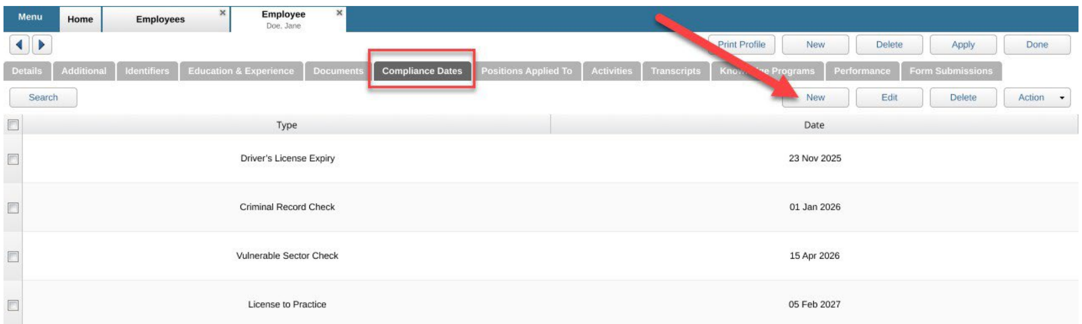
FOR ADMINS: MANAGING PERMISSIONS AND RECIPIENT GROUPS

1. Set Permissions
    a. Go to Compliance Date Type Permissions under Configuration
    b. Define who can view, manage, or edit each date type
2. Create Recipient Groups
    a. Go to Compliance Date Notification Recipient Groups
    b. Define groups for targeted notifications

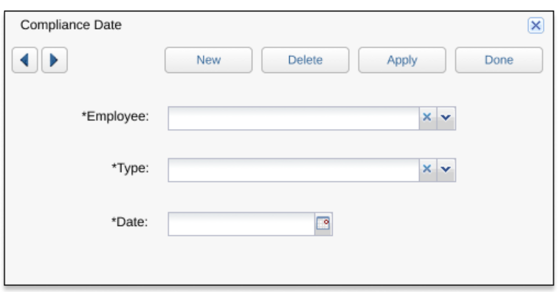
FOR ADMINS & MANAGERS: ADDING COMPLIANCE DATES TO EMPLOYEE RECORDS

FROM THE EMPLOYEE RECORD

1. Go to Admin > Menu > Employees > Employee Manager
2. Navigate to an employee's profile
3. Click the Compliance Dates tab
4. Click New to create a new compliance date



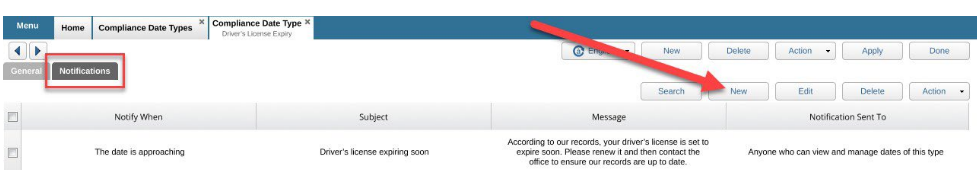
5. Select a Type (e.g., "Driver's License")
6. Enter the Date
7. Click Apply, then Done



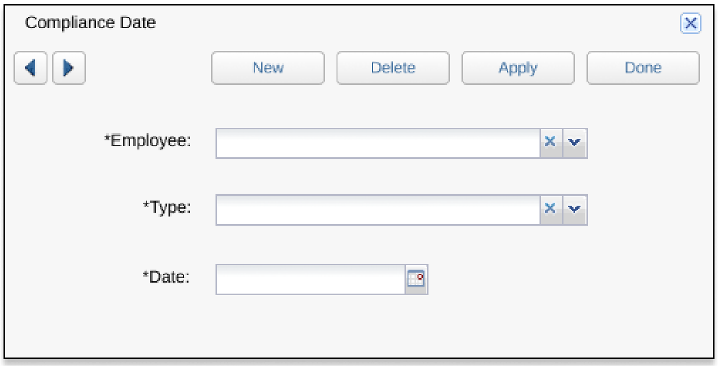
Note: Each employee can only have one date per type. If a duplicate is attempted, an error will appear.

FROM THE COMPLIANCE DATES LIST SCREEN

1. Go to Admin > Menu > Employees > Compliance Dates
2. Click New to add a Compliance Date



3. The same popup form used in Employee Manager will appear



FOR MANAGERS: MONITORING COMPLIANCE DATES

4. Go to Admin > Menu > Employees > Compliance Dates
5. Filter by Type, Date Range, Employee, Job Classification, or Business Unit
6. Use the Active dropdown to view active/inactive employees
7. Select Search
8. Use Action menu to:
    a. Export standard data
    b. Export as Crosstab by date type

Tips & Best Practices

- Use recipient groups to streamline notifications across departments or roles.
- Regularly review compliance types to ensure they reflect current organizational needs.
- Leverage the crosstab export for quick audits or compliance reporting.
- Avoid duplicate entries by remembering that each employee can only have one date per type.
- Inactive employees won’t receive notifications, but their dates are still tracked for reactivation scenarios.